

2002-03 Cal Poly Club Advisor Handbook

Services provided by:



Welcome

Dear Cal Poly Club Advisor,

Thank you for your dedication to student clubs at Cal Poly. In addition to providing valuable social and leadership experiences, clubs offer educational programming, perform campus and community service, afford opportunities for recreation, and enhance students' academic experience by giving them opportunities to "learn by doing."

This handbook contains information on the roles and responsibilities of club advisors. There are also sections that provide important information and resources that every advisor should be familiar with.

The UU Epicenter staff is committed to assisting clubs and their advisors. We are here as a resource for you, and we encourage you to contact us when you have questions.

Best wishes for a successful year and thanks again for your contributions to the Cal Poly community!

Sincerely,

The UU Epicenter Staff



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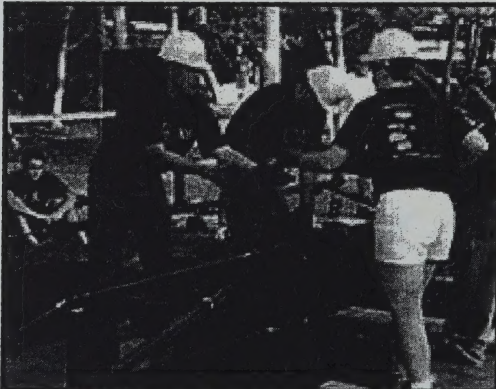
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Why it is Important to Support Clubs

Cal Poly and ASI support campus clubs for a variety of reasons. Participation in clubs benefits students by:

- Providing opportunities for students to assess and develop their skills in many areas such as leadership, human relations, goal setting and planning.
- Providing experiences which complement classroom instruction.
- Encouraging interaction with a variety of people and an understanding and appreciation of individual differences.
- Helping students identify and develop leisure time interests they can pursue during and after college.
- Involving students in the decision-making process of the University.

In summary, club involvement provides students with educational experiences which help them become more effective employees, responsible citizens, and well-rounded individuals.



Advisor Roles

- Volunteer to be a University representative to a student group.
- Provide continuity from year to year and during periods of transition.
- Help mediate conflicts within the group and assist with problems that may arise.
- Serve as a role model.
- Be aware of all plans and activities of the group.
- Recommend and encourage without imposing your ideas and preferences.
- Know the club's short term and long term goals and provide guidance to help the club reach these goals.
- Know the members of the organization and establish rapport.
- Encourage leadership and group development.

Advisor Responsibilities

ATTENDANCE

- Attend Advisor Orientation sponsored by ASI.
- Attend club and/or executive meetings when possible.
- Be present at club sponsored activities when possible.

FINANCES

- Monitor the financial records and monthly account statements.
- Carefully review and authorize all payment request forms (PRF's) clubs submit to you.
- Remind clubs to request purchase orders prior to confirming orders with vendors.

LEADERSHIP

- Assist with the orientation and training of new officers.
- Encourage all members to be part of the planning process and be supportive of group decisions.

RESOURCES

- Know where to find assistance for issues you cannot solve.
- If club members are having academic, personal or group problems, provide guidance or refer them to the appropriate University department for assistance.
- Be familiar with the organization's bylaws and the Cal Poly Club Resource Guide. Copies are available in the UU Epicenter and online at www.asi.calpoly.edu.
- Assist officers in preserving the organization's records which provide continuity (i.e. minutes, rosters, event evaluations).

UNIVERSITY REPRESENTATIVE

- Sign the Charter Renewal Application to provide your authorized signature, and to verify that the students listed on the form are the actual officers. The form must be renewed annually and may be updated throughout the year.
- Learn about pertinent University policies and procedures, and advise officers on adhering to them.
- Review all official correspondence before distribution, and retain a copy for your records.
- Meet with club services staff members, as needed, located in the UU Epicenter.

Being an Effective Advisor

An effective advisor allows students to make their own decisions and learn from their experiences rather than directing activities of the club. While it may be your first reaction to intervene and fix all of the mistakes you see, this is not the role of the advisor. Take advantage of mistakes, and use them as teachable moments with students. While it may be easy to sit back and say "everything is a learning experience, I won't interfere with what they say or do," it is your responsibility to ensure that students understand what the consequences could be for decisions they make. In other words, be proactive when a potentially controversial or policy-related situation or decision arises.

Part of the educational experience students gain in leadership positions is how to manage a budget and maintain financial records. Your primary role regarding finances will be to monitor the expenses, provide feedback on the budget, and authorizing purchase request forms. Club members must have original, itemized receipts in order to be reimbursed. Please keep in mind that club funds may not be spent on alcohol.



Club Charter

All clubs are required to have a current charter on file in the UU Epicenter. The charter describes the club's purpose and documents all club officers, authorized signatures and contact information. Clubs that do not have a current charter on file will have their privileges suspended. This means they cannot plan events, engage in any financial activity, or receive financial support.

Advisor Signature

Your signature will be required on all E-Plans and purchase request forms submitted by the club you advise. If the advisor signature on these forms does not match your signature on the club charter, a UU Epicenter staff member will contact you to verify your signature.

Advisor Absence

If you will be inaccessible to your club (due to a conference, vacation, unexpected absence, etc.), you may designate a co-advisor to assist your club and sign E-Plans and purchase request forms in your absence. You must notify the UU Epicenter in writing via e-mail or signed letter of your designee authorization. Please state the dates of your absence and the name and contact information of the co-advisor. Your designee will not be permitted to sign for you past the dates you indicate in your written notification.

Advisor Liability

The University encourages the activities of student organizations and is supportive of your role as an advisor. Your responsibility is to act reasonably performing your role. Consider yourself as a representative of both the University and the student club.

Advisors of recognized student clubs, who are employees of the University, are in most cases acting within the scope of his/her employment, and covered by University liability as long as University policies and procedures have been adhered to. The University expects advisors to inform club officers and members of relevant state laws and University policies and to take reasonable steps to enforce them.

Review club activity planning and publicity. Do you foresee any kind of danger or harm to individuals? Be aware of anything that might violate University policies or the law. Communicate possibilities and concerns with the club officers and ask what has been planned to address the concern.

Club Judicial Process

The process begins when an individual fills out a club complaint form at the UU Epicenter. The complainant will identify a potential violation of University policy by a recognized Cal Poly student club. The form is then directed to the Student Life and Leadership department, who will conduct an investigation of the allegations. Based on the findings of the investigation, the complaint may be referred to a club judicial panel for further hearings and determination of appropriate sanctions. The club judicial panel consists of three students and three University staff members, including the chair of the panel from Student Life and Leadership.

A MONTH-BY-MONTH GUIDE

The following outline should give you an idea of what to expect through the year.

September

- Review your club's bylaws and the ASI Club Resource Guide. Copies are available in the UU Epicenter and www.asi.calpoly.edu.
- Meet with your club's officers to discuss their participation in WOW activities such as the club resource fair.

October

- Attend Club Advisor Orientation.
- Establish a regular meeting time with the club leadership.
- Begin attending club/officer meetings.
- Encourage the club to have a goal setting session to determine goals for the year.
- Remind your club to attend registration session and turn in its charter renewal form.

November

- Begin discussing the club's plans for winter quarter.

December

- Evaluate fall quarter activities.

January

- Review winter quarter activities with club officers.
- Attend the Club Advisor Appreciation Breakfast.

February

- Begin discussing the club's plans for spring quarter. (This is traditionally the quarter with the most events.)
- Mandatory meetings begin for clubs participating in Open House. Some clubs will begin processing E-Plans for the event.

A MONTH-BY-MONTH GUIDE (cont.)

March

- Club officer elections are typically held between March-May. Attend elections to ensure a fair, democratic process.
- Be aware of what your club is planning for Open House and provide assistance as needed.
- Evaluate winter quarter activities.

April

- Review spring quarter activities with club officers.
- Remind club to finish up loose ends related to Open House.
- Begin to identify future leadership of club. Talk to the president about elections and officer transition.

May

- Begin planning for the following academic year.
- Assist with officer transition.

June

- Evaluate spring quarter activities.
- Attend your club's year-end banquet, if applicable.
- Self-evaluate your effectiveness with the club over the past academic year. What were your strengths? What areas could use some improvement?
- After you evaluate, relax...you deserve it!

Ongoing

- Encourage club officers and members to attend club workshops sponsored by ASI. You are welcome to attend as well.
- Meet with the treasurer regularly to review club finances.
- Review meeting minutes.
- Keep an eye out for club officers and members who may be having academic difficulty and refer them to campus resources as appropriate.

UU Epicenter

The UU Epicenter serves as a hub of activity and resources for student clubs. The Epicenter offers clubs and their advisors the following:

- A full staff of qualified individuals who are ready to assist clubs with E-Plans, account management, risk management, guidance, resource referral and event planning
- Payment requests and reimbursement checks
- Forms and paperwork
- Club mailboxes
- Club workshops on topics such as communication, fundraising and teambuilding
- Club registration and officer training
- E-Plans for club events, room reservations, and publicity
- Club resource center with computer workstations and an announcement board for upcoming events
- Resource library with information on ice breakers, team building, diversity, budget management and more
- Student art gallery
- Offices of the University Union Director, Assistant Directors and Program Coordinators
- Staff oversight of ASI Events, Craft Center, Poly Escapes and Rose Float programs

Location

University Union, Room 203

Phone

(805) 756-5807

Fax

(805) 756-7121

Hours

Monday-Thursday

Friday

Saturday and Sunday

8 am - 8 pm

8 am - 5 pm

closed

Glossary

ASI Marquee - Electronic message board that advertises upcoming events. There are three marquees; locations include the University Union Plaza, near Dexter Lawn, and by Campus Market.

Co-sponsorship - Clubs can apply to ASI to become a financial partner in events. Eligible events must be open to the entire Cal Poly community and be designed to reach a broad student audience.

Charter - A form listing the club's purpose, current officer and advisor information, and signatures to indicate those who have permission to sign on financial requests, E-Plans, and other documents. Each Fall Quarter, every club is required to re-charter so ASI can update its records and display accurate information in the Club Connection.

Club Connection - The list of all clubs and their contact information.

E-Plan - A process used to assist clubs with event planning and notify the club officers and advisor of any legal issues. The E-Plan process also electronically notifies all service providers about the event and requests their approval.

Purchase Order (PO) - An official, legal document that authorizes a vendor to deliver an ordered product or service and promises that the vendor will be paid once the product or service is delivered and invoiced. Purchase orders are to be submitted to vendors before receiving their product or service.

Payment Request Form (PRF) - A form clubs use to request funds from their account to be paid out (in the form of a check and transfer) or reserved (in the form of a purchase order).

Room Request Form - A form clubs fill out to request meeting space. Requests can be made annually or quarterly.

Sandwich Board - An A-frame sign about 3 feet high used to advertise events.

Service Agreement - An ASI legal document used when a club contracts services from a provider (i.e.-DJ, speaker, band).

Epicerter - University Union Room 203 where all ASI club services are located.

Important Phone Numbers

UU Epicenter 756-5807
Fax..... 756-7121

Student Life and Leadership 756-2476
Fax..... 756-5836

Student Academic Services 756-2301
Fax..... 756-5122

Counseling Services 756-2511
Fax..... 756-6525

Career Center 756-2501
Fax..... 756-1593

Campus Catering..... 756-1177
Fax..... 756-5953

Open House 756-7576

Week of Welcome (WOW)..... 756-2487

Facility Services..... 756-2321
Fax..... 756-6114

University Police 756-2281

University Union Information Desk..... 756-1154

Emergency911

Amateur Radio Club (CPARC)
Dan Malone

ITS-APPLICATION + INFORMATION